



Fidelity H&W Services

Vendor Assessment

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13 pages





Who Is This Vendor Assessment For?

NelsonHall's H&W Services Vendor Assessment for Fidelity is a comprehensive assessment of Fidelity's H&W offering and capabilities designed for:

- Sourcing managers monitoring the capabilities of existing suppliers of H&W and identifying vendor suitability for H&W RFPs
- Vendor marketing, sales, and business managers looking to benchmark themselves against their peers
- Financial analysts and investors specializing in the H&W sector.



Key Findings & Highlights

Fidelity is a U.S. headquartered financial services provider, offering benefits administration services.

The company's H&W service offering includes H&W administration, including COBRA admin, reimbursement/spending account services, dependent audit and verification services, and retiree health transition services, as well as HSA administration.

Fidelity primarily targets its existing, large market DC or DB administration clients with >20k employees for its H&W administration offering. The company's employer HSA administration offering is targeted at organizations with more than 2k employees.

Fidelity serves ~1.4m participants across its H&W business.

Scope of the Report

The report provides a comprehensive and objective analysis of Fidelity's H&W offering, capabilities, and market and financial strength, including:

- Identification of the company's strategy, emphasis, and new developments
- Analysis of the company's strengths, weaknesses, and outlook
- Revenue estimates
- Analysis of the profile of the company's customer base including the company's targeting strategy and examples of current contracts
- Analysis of the company's offerings and key service components
- Analysis of the company's delivery organization including the location of delivery locations.

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Report Length

13 pages

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Benefits Administration Vendor Assessments Also Available for:

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